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JEANNE LONG **
ACQ EDITOR **
CONGRESSIONAL INFORMATION SV
420 EAST WEST HWY 800
BETHESDA MD 20814

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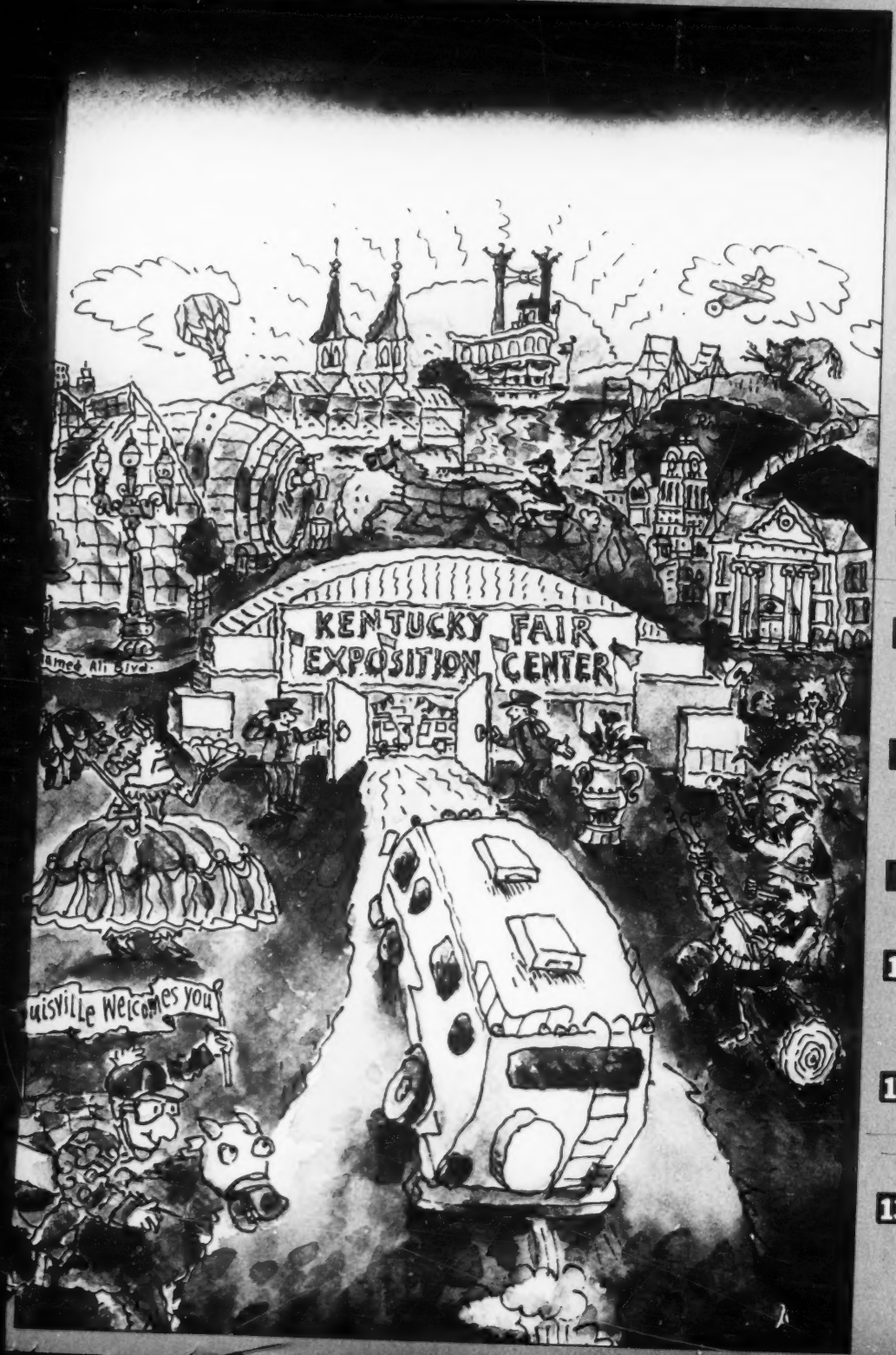

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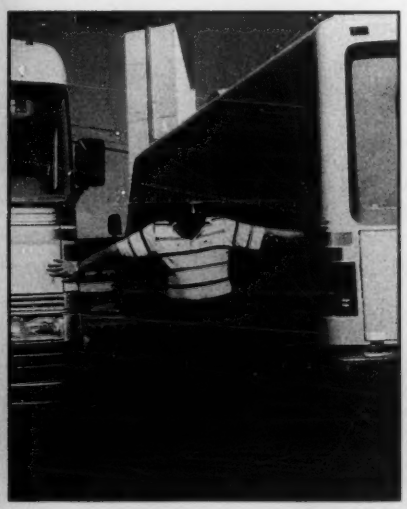

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MILD UPSURGE IN SEPTEMBER SALES

GAYLORD MAXWELL

September was a good month for most RVB Dealer Advisory Board (DAB) members. In fact, it was, compared with the corresponding month of the previous year, the best month in a long time. Total sales volume was up 12%. Individually, 14 of the 22 DAB members were up in sales from the previous September; eight were down. Four of the five RV types were up in new-unit sales, and none were down in used (one was the same). Profits were generally rated good or fair; bottom lines were most often rated fair. Inventories were generally in good shape.

Year-to-date, the picture wasn't as good, but it wasn't terrible either. Although four out of five categories of new units were down in sales, it was by only 2%. Used units were off only 4%. Total sales volume was down by less than 1%. Thirteen DAB members took in fewer dollars for the year-to-date, but nine were up.

If the mild upsurge of September continues, it is quite possible that the year will end up about the same as, or even ahead of, 1988. However, considering that a shaky stock market, lots of grim reports about S&Ls and two devastating natural occurrences have dominated the news in recent months, it would be miraculous if RV sales continued that upward trend.

Motorhomes

September was generally a very good month for motorhome sales. Only three members of the DAB failed to match or better last year's figures. A switch from the usual was that the big dealerships did not account for the increase. In fact, the little guys who normally sell five or fewer units per month accounted for most of September's increase, and the large dealerships dropped a bit. Profits were generally rated good or fair.

Year-to-date, comparative numbers were quite close. New units were off only 1%, while used were off 2%. A modest increase in the final quarter could change both minuses to plusses. Decent weather and a slight increase in optimism about the economy could do the trick.

Travel Trailers

Unusually strong sales by one of the large dealers on the DAB resulted in a new-unit increase. His jump, from 10 units for the month last year to 18 this September, more than accounted for the additional four units. The fact was that most trailer dealers were down by a unit or two from the previous year. Used-unit results were mixed, with the number of dealers up about equal to those who were down. Profits were generally rated good.

Year-to-date, travel-trailer sales were following the slightly downward trend set early in the year, and it is quite likely that they will continue to be off the pace somewhat for the rest of the year.

Truck Campers

Our sample is quite small but has been consistent all year. There was no doubt that sales of this RV type were off. Although the percentage rate was rather high, the difference in units was quite small. Both of our DAB camper specialists were down for the month in new units. Used sales tied the previous September. Although sales were weak, profits were rated excellent.

Year-to-date, the picture was almost identical with that of last September in new units. The used picture was more grim. Considering the trend for much of the year, there was little reason to expect a significant change.

Folding Camping Trailers

The large percentage increase for September suggested a better month than it actually was. The 10-unit increase was due primarily to close-outs by two dealers. Sales were slow, and profits were weak as dealers of this type tried to clean up their inventories.

New-unit totals for this year and last indicated very close race. It was, however, due to the fact that one dealer who sold only one unit in 1988 sold 97 this year—more than 10% of the DAB total. Obviously, some other dealers were considerably off the mark. It is quite unlikely that there will be

	NEW UNITS						USED UNITS					
	FOR MONTH			YEAR-TO-DATE			FOR MONTH			YEAR-TO-DATE		
MOTORHOMES	128	115	+11	1,328	1,346	– 1	97	96	+1	1,213	1,242	– 2
TRUCK CAMPERS	20	25	–20	199	243	–18	16	16	0	99	144	–31
FIFTH-WHEELS	37	30	+23	364	312	+17	25	19	+32	125	133	– 6

	FOR MONTH			YEAR-TO-DATE		
	SEPT. 1989	SEPT. 1988	% CHANGE	1989	1988	% CHANGE
TOTAL UNIT SALES	560	518	+11	6,422	6,611	–3
USED-UNIT SALES	248	235	+ 6	2,693	2,812	–4

The "DAB Perspective" is a compilation of data provided by *RV Business*' Dealer Advisory Board, a group comprised of 23 dealers representing a cross section of the U.S. dealer body.

Gaylord Maxwell, chairman; **Dave Altman,** Baldwin Park, Calif.; **Bob Azevedo,** Sunnyvale, Calif.; **Jack Cole,** Pacoima, Calif.; **Dick Dasson,** Victor, N.Y.; **Crosby Forrest,** Newport News, Va.; **Dan Gamel,** Fresno, Calif.; **Jerry Greer,** Columbus, Ohio; **Jerry Harrison,** Waco, Texas; **Dottie Helgeson,** Seattle, Wash.; **Johnny Ketelsen,** Marion, Iowa; **Newton Kindland,** Orlando, Fla.; **Roger Kirschner,** Salem, Ore.; **Ozzie Lenhard,** Sayville, N.Y.; **Larry McClain,** Oklahoma City, Okla.; **Annette Autry-Miller,** Fayetteville, N.C.; **Jack Moran,** Warwick, R.I.; **Wayne Peay,** Albuquerque, N.M.; **Tom Schaeffer,** Shoemakersville, Pa.; **Mel Shipp,** Chattanooga, Tenn.; **Jack Sisemore,** Amarillo, Texas; **Bill Thomas,** Bridgeton, Mo.; **Randy Thompson,** Crystal Lake, Ill.; **Dave Washburn,** Lakewood, Colo.

This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

DAB PERSPECTIVE *continued*

much change in the final quarter.

Fifth-wheels

There was no doubt about it: Fivers were going strong. Consistently up during the year, fivers' year-to-date figure was the only one of the five RV types in the plus column.

Apparently, where it counts most — in profit — the numbers were right.

Several members of the DAB were getting impressive unit numbers — two in the 50s and one with a total of 95 for the year-to-date. However, 13 of the 19 who stock them had sold fewer than 15 units to date, and eight of those sold fewer than 10. It is generally not a big-unit numbers game.

Profits generally were good in September; three dealers marked them excellent. Apparently, where it counts most — in profit — the numbers were right. It has been that way for quite some time, and there's no apparent reason for them to change. Δ

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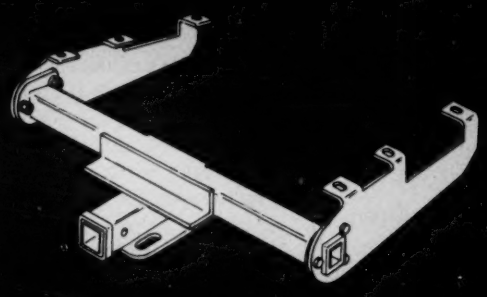

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